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ABSTRACT

A study conducted in 1980 to examine the first year of the role and functions of Project Basic facilitators is described. Project Basic is Maryland's statewide competency-based educational program. The facilitators are state education agency (SEA) supported staff located at 23 of the state's 24 local education agencies (LEAs). The two major facilitator responsibilities are: (1) to facilitate local implementation of the state mandated program; and (2) to serve as a state-local communication link. Data were collected by Maryland State Department of Education documents, survey questionnaires, and interviews. Respondents included SEA senior management, Project Basic staff, facilitators, and LEA coordinators. Findings are reported for two points in time: July 1979 and July 1980. Results indicated that the facilitator role was perceived as successful by all levels of the educational hierarchy in that facilitators ensured local implementation of the project and maintained good relationships between state and local agencies. Problem areas were identified. (Author/RL)

LINKING AGENTS AND STATE-MANDATED EDUCATIONAL PROJECTS: A STUDY OF THE ROLE AND FUNCTIONS OF FACILITATORS DURING IMPLEMENTATION OF MARYLAND'S PROJECT BASIC

by

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Abstract

This paper describes a study conducted in 1980 to examine the first year of the role and functions of Project Basic facilitators. Project Basic is Maryland's statewide competency-based educational program. The facilitators are SEA-supported staff located at 23 of the state's 24 local education agencies (LEAs). The two major facilitator responsibilities are: 1) to facilitate local implementation of the state mandated program, and 2) to serve as a state-local communication link.

Data were collected by document analysis, survey questionnaires, and interviews. Respondents included SEA senior management, Project Basic staff, facilitators, and LEA coordinators. The study consisted of several phases: 1) document analysis, 2) key informant interviews, 3) use of survey questionnaires, 4) interviews with selected facilitators and coordinators, and 5) interviews with senior SEA staff. Critical responses from one phase were used to determine questions for the next phase.

Findings are reported for two points in time: July 1979 and July 1980. In each case, the following areas are discussed: selection and assignment of the role incumbents, involvement in planning and defining the role, support and commitment, responsibilities and time spent on implementation and communication tasks, and preparation and training in role competencies. Role changes and causes of change are discussed in terms of strengths and problem areas.

In general terms, results indicate that the facilitator role was perceived as successful by all levels of the educational hierarchy in that facilitators ensured local implementation of the project and maintained good relationships between state and local agencies. Problem areas identified related to support (from SEA Project Basic), conflict of interest (for facilitators at local sites), documentation and communication (paperwork burdens, and hierarchical vs. lateral structures), and external implementation (understanding by SEA of LEA needs). The strategy of assistance rather than accountability to encourage local implementation of a state mandated program appears to be successful in Maryland.

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Introduction

This paper presents the results of a study conducted in 1980 designed to describe the role and functions of linking agents assigned by the Maryland State Department of Education to facilitate the local implementation of Project Basic — a statewide competency-based education program. The paper is organized into the following sections: introduction, background information, research methods, findings, discussion, and implications.

Background Information

In January 1977, the Maryland State Board of Education enacted a resolution which legislatively mandated the establishment of competency-based graduation requirements by 1982 in the following areas of human activity: Basic Skills, Survival Skills, the World of Work, the Arts/Physical Education, and Citizenship. This legislation resulted from the recommendations of a six-months' study of the mission and organization of the Maryland State Department of Education (MSDE) and state-wide concerns over educational and fiscal accountability.

The vehicle designated for ensuring the acquisition of competency in these five areas was Project Basic: Learning for Effective Adulthood. This five-year project included an implementation model strongly influenced by studies of implementation and knowledge utilization (e.g., Berman et al., 1975; Emrick & Peterson, 1978; Fullan & Pomfret, 1977). Findings of these and other studies suggested use of more effective implementation strategies. Therefore, Project Basic incorporated strategies to facilitate local-state liaison, one of which was the involvement of Project Basic Facilitators (linkers).

The Facilitator Role

The decision to introduce a linkage/assistance position was influenced by a variety of factors including LEA needs, MSDE interests, and relevant research. The following discussion summarizes the history of the role design.

The Comprehensive Plan for Maryland Competency-Based Prerequisites for Graduation, distributed throughout Maryland early in 1978, stated that the implementation of Project Basic would require provision for technical assistance and inservice, and also stated that responsibility for local-state liaison would be taken by the LEA coordinators. By mid 1978, as planning for implementation intensified, it became apparent that the coordinators, most of whom were assistant superintendents for instruction with the multiple responsibilities of that position, would be heavily over-burdened if they had to take on additional tasks. Since Project Basic was a mandated state-wide program, the state education agency (SEA) needed to explore other alternatives for ensuring effective local-state liaison and for providing technical assistance to LEAs attempting to implement a competency-based education program.

During the last six months of 1978 a task force of LEA coordinators, Project Basic staff, and a member of Research for Better Schools Regional Exchange (RBS Rx), developed the Project Basic Guide for Statewide Implementation. At the same time, a technical assistance (TA) team made up of Project Basic and RBS Rx staff, explored alternative organizational structures, roles, and responsibilities for provision of assistance by the SEA to the LEAs. The two interactive tasks were strongly influenced by the literature on educational change, linkage, and implementation.

Theoretical Basis. Although there are many models of planned educational change discussed in the literature, Maryland's Project Basic is closest to the Local Process of Change (LPC) model described in the Rand study (Berman et al., 1975), in that school and district staff were perceived as rational, adaptive, and cooperative, and the "innovation" allowed for some local modification of the "prespecified package" (Roberts, 1978a). The implication was, therefore, that the SEA role would most likely be as an expert consultant, linking local educators to the SEA Project Basic knowledge base. However, further clarification was needed. The literature identifies a need to distinguish between knowledge utilization and the implementation of innovations (Sieber, et al., 1972). Piele (1975) similarly found that linking generally appears to be more equated with change and the adoption of innovations rather than as support for program improvement efforts. Piele also identified as a problem the lack of research on the function of linking agents.

Nash and Culbertson (1977) stated, "a key function of linking agents, whether internal or external to a school system, is to help those engaged in improvement activities acquire and use relevant ideas, products, and related resources." However, they also acknowledged that not all personnel in school systems or in external agencies, such as "state education agencies; intermediate service agencies; research and development centers; departments and related units in higher education institutions; educational laboratories; and leagues, networks, and related organizations, serving multiple school systems," (p. 2) qualify as linking agents They formulated three critical criteria to distinguish between linking and non-linking agents:

> First, linking agents direct their actions at the improvement of individual or institutional performance. Second, they use knowledge or knowledge-based products and services as key instruments of improvement. Third, in order to connect those engaged in change with ideas, findings, descriptions of practices, training materials, and other needed knowledge-based products, they must perform boundary spanning roles.
>
> (Nash & Culbertson, 1977, pp. 2-3)

The implications of ideas such as these reviewed by the TA team, suggested reallocation of resources and very careful examination of the values or philosophy of both SEA and the LEAs. (For instance, should the SEA pay for linkers, and if so, would the LEAs accept boundary spanners trying to improve institutional performance?) Also, it was necessary to determine exactly what kind of linker would be most appropriate. Would they be catalysts, solution givers, process helpers, or resource linkers (Havelock, 1973, p. 60)? Would they be inventors (Hall & Alford, 1976)? Would they be monitors/evaluators -- the role most commonly played by SEA staff ensuring local implementation of state-mandated programs? These and similar questions were answered by the Project Basic TA team, responding to a survey based on propositions based on the literature of linkage and educational change.

Preliminary Design. The results of the survey were described in Clarification of Roles and Responsibilities. Excerpts from that paper follow:

> Confusion was found in three areas.
>
> Documentation... Since most TAs are field-oriented, many would prefer to do as little paper work as possible.

... If the TA role is seen in general terms, incumbents do not consider it desirable to impose external views on local systems.

... The negative impact on project implementation of barriers created by lack of goal coherence and by conflicting interests of individuals and groups involved.

Consensus of opinion among those interviewed indicates the following:

1. A Project Basic TA is primarily a process helper, also acting as a catalyst and resource linker, and sometimes as a design facilitator. Although an individual TA may be an expert in a particular field, he or she cannot be expected to be (nor should be perceived as) an expert consultant. The TA should have access to expertise.

2. On no account should a TA take the roles of solution giver, monitor, or evaluator.

3. At present, the role of inventor seems unlikely for individuals, although the TA team may need to invent products and processes for future unanticipated problems.

4. In order to be effective, a TA should have a problem-solving orientation, be productive (especially as illustrated by meeting deadlines and effectively anticipating needs), and be competent (especially in terms of developing a project-related knowledge base, not wasting time and other personal resources).

5. It is desirable for TAs to develop the characteristic of cosmopoliteness.

6. A sense of survival -- if interepreted as internal politicking -- is perceived as counter-productive.

7. It is essential that TAs have, or develop, a knowledge base of the content (CBE in general, Project Basic in particular), planning and implementation strategies and processes, and of available resources (all kinds, where they are, how they can be best used, etc.).

8. The knowledge required to conduct TA relating to specific tasks is essential to the TA team. Access to and application of relevant knowledge and expertise should be an on-going and shared priority of TA team members.

9. Skills in planning and evaluation (the latter in a general, formative sense) should be developed by each TA.

10. Each TA should be able to assess internal norms of local systems, and be able to simulate mentally the roles, responsibilities, and perspectives of individuals within such systems.

11. TAs should make every effort to:

    - make optimal use of all resources
    - establish personal credibility
    - become familiar with the internal system
    - use face-to-face communication, plus "hard copy"
    - conserve, rather than overcommit personal resources.

12. TAs should make some effort to:

    - use existing communication networks
    - focus on user need. (Roberts, 1978b)

Following review of these recommendations by local and state administrators, the State Superintendent for Schools and the Project Basic Director confirmed the preliminary design of Project Basic facilitators. SEA staff selected from all divisions were assigned by their directors and the State Superintendent to Project Basic. The first six months of 1979 was a transition and training period. Facilitators were then assigned to the LEAs, where they would work until mid 1982. The assumption was made that by then, Project Basic would be institutionalized and the facilitators could return to their original positions.

Formalization. During the first six months of 1979, the roles and responsibilities of the facilitators were further clarified. For example, some LEAs assigned local staff as facilitators and incumbents participated in defining roles and responsibilities.

In June 1979, Project Basic developed The Project Basic Facilitator Role -- the first in a series of resource papers. The paper reflected recommendations made by LEA Superintendents and Coordinators, Project Basic staff and facilitators-in-training, and had the support of the State Superintendent of Schools. The following excerts are from that paper.

> 1. To assist with the implementation of Project Basic at the local level
> 2. To serve as a communication link among the various LEAs and between each LEA and MSDE
>
> The focus is service -- not control...a corps of people... work directly with local school systems during the implementation phase...The Facilitator is a permanent or contractual employee of the MSDE. Each facilitator will be assigned to assist a specific LEA. The precise nature of the assistance...is to be determined jointly by the LEA Project Basic Coordinator and the Facilitator.
>
> (Project Basic Facilitator Role, 1979)

Funding for the project was provided by MSDE. The facilitators were selected from MSDE staff members and from personnel within the local education agencies (LEAs). The LEAs provided office space and varying amounts of clerical support for the facilitators, as well as designating a key staff person (usually an Assistant Superintendent for Instruction/ Curriculum) as the LEA Project Basic Coordinator. Facilitators were expected to help LEA and school staff implement the competency-based education program for a period of three years. The 1979-80 school year was

the pilot year in which one or two schools from each of the 24 local systems incorporated statewide competencies into existing local curriculum, and field-tested the state competency tests in reading and mathematics. Facilitators worked with the LEA coordinators on those and similar activities, and also performed a local-state linkage function representing local interests to the Maryland State Department of Education (MSDE).

In 1980, the study reported in this paper was conducted to describe the role and functions of the facilitators working as linking agents in 23 of the 24 LEAs.* One objective was to describe the role as perceived in July 1979 when incumbents began working in the LEAs; other objectives related to the nature, extent, and causes of change (if any) in the role as implemented. The decision to conduct the study was influenced by formative data indicating that the facilitators were performing functions perceived to be useful by all levels of the educational hierarchy. It was expected that results of the study would be used to determine opportunities for improvement and/or expansion of the role.

Research Methods

Data were obtained using a combination of document analysis, interviews, and surveys. The analysis of MSDE documents concerning Project Basic and interviews with several key MSDE staff informed the survey's design; the surveys were able to tap the opinions of most of the Project

* One LEA chose not to have a facilitator: the LEA coordinator was responsible for facilitating Project Basic implementation.

Basic facilitators and coordinators on a variety of topics; and another series of interviews with a smaller number of facilitators, coordinators, and MSDE senior management allowed particular issues arising from the surveys to be pursued in more depth. The following sections describe these methods in more detail.

Selection of Variables

The selection of variables on which to collect information regarding the roles and functions of MSDE Project Basic facilitators as linking agents in state-mandated educational projects was conducted in two major steps. First, MSDE documents and records related to the original conception and design of the MSDE facilitator role were examined. These documents included: major publications such as The Comprehensive Plan for Maryland Competency-Based Prerequisites for Graduation and Project Basic's Guide for Statewide Implementation; planning documents such as Clarification of Roles and Responsibilities; and resource papers such as Communication Network and The Project Basic Facilitator Role. In examining these documents, emphasis was given to defining the intended and perceived functions of the Project Basic facilitator role. As a result of this examination, an initial framework of the facilitator role was developed. This framework was validated by interviewing key MSDE staff extensively involved in the conceptualization and development of the Project Basic facilitator role. These MSDE staff were specifically questioned about the history of the Project Basic facilitator role; the intended and actual functions of facilitators; selection, training, and support of the facilitators; and interactions and relationships between MSDE and LEAs concerning Project Basic facilitators.

As a result of the document analysis and interviews with key informants, an initial list of variables was developed. This list included four major categories of variables: 1) intended functions of facilitators relating to implementation and communication, 2) competencies identified by facilitators as important to their role, 3) planning and assistance already provided to and still required by facilitators, and 4) relationships and involvement of key groups related to the facilitator role.

Data Collection Samples and Strategies

Three samples were identified for the collection of data related to the roles and functions of the Project Basic facilitators as linking agents in state-mandated educational projects. The first, and most important sample was obviously the Project Basic facilitators. Their activities and perceptions as the key actors in this effort would provide valuable insight in both defining and understanding the role of SEA linking agents to LEAs. Because the responses and reactions of the LEAs to the Project Basic facilitators are also important in understanding the role of the state linking agent, the LEA Project Basic coordinators (who by job function interacted most with the facilitators) were identified as a second sample. A third sample was senior management staff of MSDE. It was determined that data on all of the variables could be collected using paper and pencil questionnaires; however, personal interviews would nevertheless be especially helpful in clarifying and amplifying survey collected data. It was therefore agreed to rely on a three-prong data collection strategy. All Project Basic facilitators and coordinators would be asked first to complete a

paper and pencil questionnaires; a sample of facilitators and coordinators would also be interviewed to obtain more in-depth information. Finally, MSDE management staff would be interviewed to provide a state perspective on the role.

Development of Surveys

Two parallel paper and pencil questionnaires were developed to collect data from Project Basic facilitators and coordinators. Both surveys were divided into three sections; each section was further divided into specific areas. Table 1 presents the composition of both the facilitator and coordinator surveys.

Individual items were written to assess each of these variables. Almost all items were composed using multiple-choice or Likert formats to facilitate completion of the survey by facilitators and coordinators and to simplify tabulation and analysis of the responses. Space for additional comments was provided after each item to provide all respondents with the opportunity to explain their responses. Drafts of both surveys were reviewed by key MSDE staff to insure their appropriateness.

Administration of Surveys

The Project Basic facilitators were asked to complete their surveys during one of their regularly scheduled staff meetings at MSDE. Facilitators were not asked to indicate their names on the survey; rather, the surveys were coded to protect anonymity and privacy. Completed surveys were returned by 22 of the 23 facilitators (96 percent).

Table 1

Composition of Surveys

Content	Facilitator Survey	Coordinator Survey
A. Selection and Assignment		
1. Project Basic Facilitator to LEA	X	X
2. LEA Project Basic Coordinator		
3. Satisfaction with Assignment Procedures	X	X
4. Length of Assignment to Project Basic	X	X
B. Competencies of Project Basic Facilitators		
1. Competencies Prior to Assignment to LEAs	X	
2. Importance of Competencies	X	X
3. Usefulness of Additional Planning and Assistance Related to Competencies	X	X
C. Roles and Responsibilities of Facilitators		
1. Expected Allocation of Time	X	X
2. Actual Allocation of Time	X	X
3. Involvement of Relevant Staff in Defining Facilitator Role Prior to LEA Assignments	X	X
4. Involvement of Relevant Staff in Defining Facilitator Role Since Assignment to LEAs	X	X
5. Understanding of Facilitator Role Prior to LEA Assignment	X	X
6. Changes in Facilitator Role	X	X
7. Supportiveness and Commitment Provided to Facilitators Prior to LEA Assignment	X	X
8. Supportiveness and Commitment Provided to Facilitators at End of School Year	X	X

The Project Basic coordinators received their surveys to complete in the mail. The survey was accompanied with a cover letter explaining the purpose of the study and asking for their cooperation. As with the facilitators, the coordinators' surveys were also coded with identification numbers. Completed surveys were received from 20 of the 23 coordinators within a three-week period.

The questionnaire responses of the facilitators and coordinators were tabulated and analyzed. Item frequencies, means, and standard deviations were calculated. Content analyses were conducted of facilitators' and coordinators' comments to open-ended items. The findings of these analyses are presented in the results section of this paper.

Interview Design

Several issues emerged from the survey data which seemed critical to explore further in structured, open-ended interviews. These issues included the sources, kinds, and amounts of role support facilitators received; the formal and informal networks facilitators used to obtain needed resources; the degree and consequences of facilitator role autonomy; the balance between anticipated and unanticipated tasks facilitators found it necessary to perform; and school district reactions to the facilitator's role. For each of these research issues, three to five interview questions were generated. During the interviews, more specific probes were frequently used to get a respondent to expand or clarify an answer.

Interview Sample

The Project Basic facilitator and coordinator in each of eight districts were interviewed. Districts were selected according to their size

because it was expected that size would be related to the amount of technical resources available to a district. Student enrollment was used to determine district size. Districts were then categorized as being small, medium, or large. Three large, three medium districts and two small districts were selected, primarily according to: 1) whether or not both the facilitator and coordinator in a district indicated that they would consent to be interviewed, 2) feasibility of scheduling dates and locations, and 3) whether the facilitator had been selected from MSDE or LEA staff (four facilitators were selected from each).

Interview Data Collection and Analysis

Facilitators were asked the questions about support, resource networks, autonomy, and additional tasks; coordinators were asked questions concerning district reactions, resource networks, and additional tasks. The interviews generally lasted one hour. Although the sessions were recorded on tape, the interviewer also took field notes. Data from both sources were analyzed by categorizing individual responses according to common themes, and from this categorization process, patterns of responses emerged. After this analysis was complete, the results served as the basis for interviews with eight MSDE senior management staff. Interview topics included: state-local liaison benefits, role strengths and weaknesses and implications for change, and role differences perceived. Data were analyzed in the same way as the results of the other interviews.

Findings

From a generic point of view, the primary objective of the study was to describe the role and functions of the facilitators working as linking agents with the 23 LEAs. Four specific questions were posed:

- What was the original role design?
- What are the role(s) and functions of the facilitators after one year of implementation?
- What are the differences (if any) between the original role design and the role as enacted after one year of implementation?
- What are the perceived causes for change (if any) in the role over the first year?

It was understood that answers to these questions would guide the continuing development of the facilitator role.

The findings of the study are organized in terms of the four specific questions.

Original Role Design

As stated in the Background Information section of this paper, the facilitator role was designed over a period of several months. For the purposes of this study, the question of "original role design" relates less to the intended design, than to the design as perceived in July 1979 when facilitators first began working at the LEA sites. Findings are presented in terms of selection and assignment, involvement in role design, support and commitment, implementation and communication responsibilities, and competencies needed to perform the role.

Selection and Assignment. Of the 22 facilitators involved in this study (data collected June/July 1980) all but two had performed the role

for over seven months. Ten were assigned by the SEA, seven by LEAs, four volunteered, and one came to the position by other means. Most (11) were "matched" to their local sites by LEA request; six chose their sites, and in five cases the assignment was made by the SEA. The degree of satisfaction with the process of selection and assignment was high; 70 percent of the facilitators and 66 percent of the coordinators were "very satisfied".

Involvement in Role Design. Both facilitators and coordinators were asked to indicate the extent of involvement in defining and planning the facilitator role, by various groups, prior to July 1979. Responses are summarized in Table 2. Both groups believed that Project Basic staff and MSDE management were most involved and that LEA superintendents were least involved. Each group considered themselves between "not very involved" to "somewhat involved."

Support and Commitment. In response to questions relating to the extent of support and commitment from various groups to facilitators before July 1979, both facilitators and coordinators considered that high degrees of support were given by the State Superintendent and Project Basic staff. Both respondent groups also agreed that, at that time, relatively little support was given by LEA Superintendents, LEA staff, and MSDE staff. Means ranged from a low of 2.56 to a high of 4.00 (with a possible range of 1.00 to 4.00).

Implementation Responsibilities. Facilitators assisted Project Basic implementation during the 1979-1980 school year by carrying out tasks in 10 general areas (see Table 3). With only one or two schools in each district

Table 2

Facilitators' and Coordinators' Perceptions of Groups Involvement in Planning and Defining the Facilitator Role

Groups	Facilitators				Coordinators			
	Before July 1979		By July 1980		Before July 1979		By July 1980	
	Mean	S.D.	Mean	S.D.	Mean	S.D.	Mean	S.D.
Project Basic facilitators	2.74	.93	3.13	.83	2.72	.96	3.44	.78
MSDE Project Basic staff	3.42	.96	3.18	.81	3.59	.80	3.47	.80
MSDE senior management	2.88	.99	2.94	.83	3.27	.96	3.07	1.00
LEA Project Basic coordinators	2.50	.86	3.19	.83	2.83	.79	3.17	.92
LEA superintendents	2.12	.60	2.19	.40	2.17	.51	2.22	.65

n ratings can vary from a high of 4.00 (very involved) to a low of 1.00 (not applicable)

Table 3

A Comparison of the Project Basic Facilitators' and Coordinators' Perceptions of Time Expected to be Spent by the Facilitators on Their Roles and Responsibilities Related to Implementation

Roles and Responsibilities	Facilitators N=22		Coordinators N=20	
	Mean	S.D.	Mean	S.D.
Assist in Project Basic Implementation by:				
1. Clarifying Project Basic goals and activities for LEA personnel	3.71	.56	3.45	.83
2. Assisting in completion of products or tasks specified in the local implementation plan	3.67	.48	3.70	.57
3. Providing up-to-date information about Project Basic priorities and activities	3.67	.48	3.30	.57
4. Providing assistance responsive to LEA needs and interests	3.62	.50	3.42	.51
5. Providing relevant personal expertise to LEA	3.43	.60	3.50	.76
6. Working with local coordinator	3.38	.59	3.35	.59
7. Following local implementation plan	3.38	.67	3.68	.48
8. Informing LEA educators of relevant MSDE programs	3.33	.48	2.70	.80
9. Informing LEA educators about relevant MSDE resources	3.05	.67	2.55	.69
10. Providing for services of other MSDE staff with relevant expertise	2.65	.67	2.20	.77

Mean ratings can vary from a high of 4.00 (a great amount of time) to a low of 1.00 (not applicable).

piloting the competency-based education program, both coordinators and facilitators expected the latter to spend a great amount of time "assisting in completion of projects or tasks specified in the local implementation plan." By contrast, both groups also agreed that facilitators would spend little time "providing for services of other MSDE staff with relevant expertise."

Communication Responsibilities. Eleven task areas related to communication (see Table 4). There was a high degree of agreement between coordinators and facilitators that the latter would spend a great amount of time "maintaining productive working relationships with LEA," and "conducting Project Basic orientation sessions for interested parties." There was less agreement between the two groups in terms of least amount of time allocated, with most facilitators predicting little time on "participating in facilitator team report sessions to MSDE Assistant Superintendents," and coordinators indicating that little time would be spent by facilitators "filing monthly reports/plans with the Office of Project Basic."

Competencies. Document analysis and interviews with key informants indicated that there were 37 competencies important to the facilitator role and functions. The competencies were presented on the survey forms by five competency areas: communication (eight), problem solving (five), leadership/management (nine), perception (four), and knowledge of Project Basic (eleven). Table 5 summarizes the importance by area as perceived by the facilitators and coordinators.

Table 4

A Comparison of the Project Basic Facilitators' and Coordinators' Perceptions of Time Expected to be Spent by the Facilitators on Their Roles and Responsibilities Related to Communication

Roles and Responsibiliities	Facilitators N=22		Coordinators N=20	
	Mean	S.D.	Mean	S.D.
Serve as communication link by:				
1. Maintaining productive working relationships with LEA	3.86	.36	3.70	.47
2. Conducting Project Basic orientation sessions for interested parties	3.62	.50	3.70	.47
3. Maintaining ongoing communication with LEA coordinator	3.43	.60	3.25	.55
4. Representing MSDE interests and concerns to LEA	3.29	.56	2.79	.63
5. Keeping Director of State Implementation up-to-date and informed of LEA implementation activities	3.14	.73	2.55	.60
6. Representing LEA interests and concerns to MSDE and Office of Project Basic	3.00	.65	2.95	.69
7. Filing monthly reports/plans with the Office of Project Basic	2.95	.74	2.15	.67
8. Attending facilitator meetings scheduled by MSDE	2.90	.62	2.80	.62
9. Maintaining communication with Director of State Implementation	2.90	.62	2.75	.64
10. Communicating with other LEA facilitators	2.80	.77	2.33	.59
11. Participating in facilitator team report sessions to MSDE Assistant Superintendents	2.38	.59	2.40	.60

Mean ratings can vary from a high of 4.00 (a great amount of time) to a low of 1.00 (not applicable).

Table 5
Perceived Importance of Competency Areas

Competency Area	Facilitators N=22 Mean	Coordinators N=20 Mean
Communication skills	3.79	3.72
Problem solving skills	3.72	3.74
Leadership/Management skills	3.86	3.83
Perception skills	3.56	3.60
Knowledge of Project Basic	3.60	3.62

Mean ratings can vary from a high of 4.00 (very important) to a low of 1.00 (not applicable)

Most facilitators ranked every competency as somewhat important or very important, with no mean below 3.30 (community involvement). With the exception of networking (mean 2.94), most coordinators ranked every competency as somewhat important or very important. After "networking", the next lowest item was "experiential learning" (mean 3.20). Table 6 presents those competencies given the highest rating of importance by facilitators and coordinators.

Table 6

Competencies Perceived to be Most Important

	Competency	Facilitators N=22 Mean	Coordinators N=20 Mean
A1	Foster collaboration	4.00	3.90
A7	Develop facilitator network	3.55	2.94
C1	Build Trust	4.00	4.00
C2	Demonstrate reliability	4.00	3.90
E3	Know PB goals	3.79	4.00
E4	Know PB implementation	3.79	4.00

ratings can vary from a high of 4.00 (very important) to a low of 1.00 (not applicable)

Training provided by Project Basic to the facilitators in early 1979 related to those competencies. In general, most facilitators felt well prepared in the five competency areas (see Table 7). Specific competencies in which most facilitators felt very prepared were "demonstrating reliability" and "assuming responsibility." With one exception, mean ratings for preparedness of specific competencies were all above 3.15 (with a possible range from a low of 1.00 to a high of 4.00). The exception was "developing a support network among facilitators," which had a mean rating of 2.81 (SD=1.03).

Table 7

Perceptions of Preparedness and Usefulness of Additional Planning or Training -- by Competency Area

	Preparedness	Additional Planning or Training	
	Facilitators Mean	Facilitators Mean	Coordinators Mean
Communication Skills	3.58	2.84	2.59
Problem Solving Skills	3.43	3.04	2.82
Leadership/Mgt. Skills	3.72	2.77	2.59
Perception Skills	3.45	2.71	2.49
Knowledge of Project Basic	3.26	2.72	2.63

Mean ratings can vary from a high of 4.00 (very important) to a low of 1.00 (not applicable)

Summary. The original role design was influenced by relevant research studies, by the opinions of Project Basic staff, by the decisions of senior administrators of the SEA and LEAs, and by the role incumbents and LEA coordinators. Major responsibilities related to local implementation, and state-local communication. Role incumbents needed to be competent in five competency areas encompassing 37 specific competencies. As they began their assignments (July 1979) facilitators felt generally well prepared. There was a fairly good common understanding among coordinators, facilitators, and Project Basic staff of the facilitator role(s) and functions to be performed during the Project Basic pilot year.

Role Changes (School Year 1979-1980

One research question to be addressed was "What are the role(s) and functions of the facilitators after one year of implementation?" A related question suggested examination of the differences between the original role design and the role as enacted. A third question suggested examination of perceived causes for change. The findings of the study indicate that the three questions are best addressed together. There was high consensus among the LEA coordinators, the Project Basic facilitators, MSDE Project Basic staff, and MSDE senior management about the nature of the facilitators' role and the tasks to be performed. Data also suggest that there was relatively little change in the role from the preliminary design, initiated in September 1978, to the end of the pilot year, July 1980. Rather, the role evolved as a result of the facilitators having made the adjustments and adaptations necessary to accomodate the individualized needs and differences of the various LEAs.

Specific findings are reported in terms of involvement in role design, support and commitment, responsibilities in implementation and communication, the competencies, role strengths, problem areas, and nature and causes of change.

Involvement in Role Design. Table 2 presents responses by facilitators and coordinators of their perceptions of groups' involvement in the design of the role before July 1979 and by July 1980. Facilitators considered that four of the five groups had a greater degree of involvement by the end of the school year, with the greatest increase of influence by the coordinators. Facilitators perceived that Project Basic staff involvement had decreased. Coordinators considered involvement to have decreased for Project Basic staff and MSDE senior management, and to have increased for the three other groups with the greatest increase in involvement in role definition/design by the facilitators.

Support and Commitment. Table 8 presents responses by facilitators and coordinators of their perceptions of support and commitment given to facilitators by various groups before July 1979 and one year later. Both respondent groups reported increased support over time from all ten interest groups, with the greatest increases from pilot school staff and principals and LEA staff. Both respondent groups found least support given by LEA superintendents, but end-of-year mean scores (3.00 and 3.22) indicated that they were "somewhat supportive."

Table 8

Support and Commitment Given to Facilitators

Group	Facilitators				Coordinators			
	Before July 1979		By July 1980		Before July 1979		By July 1980	
	Mean	S.D.	Mean	S.D.	Mean	S.D.	Mean	S.D.
MSDE superintendent	3.59	1.00	3.61	.78	3.75	.77	4.00	-
MSDE senior management	3.00	1.00	3.33	.98	3.59	.80	3.81	.40
MSDE staff	2.69	.87	3.13	.50	3.19	.91	3.33	.72
MSDE Project Basic staff	3.56	1.04	3.63	.68	3.76	.75	3.94	.25
LEA superintendents	2.56	.96	3.00	.77	2.88	.83	3.22	.45
LEA Project Basic coordinators	3.39	.98	3.79	.42	3.52	.51	3.74	.45
LEA staff	2.78	1.00	3.47	.61	3.00	.75	3.47	.61
Pilot school principals	3.22	1.00	4.00	-	3.39	.78	3.83	.38
Pilot school staff	2.89	.96	3.74	.45	3.21	.71	3.89	.32
Project Basic facilitators	3.17	1.10	3.79	.42	3.61	.85	3.79	.71

Mean ratings can vary from a high of 4.00 (very supportive) to a low of 1.00 (not applicable)

Implementation Responsibilities. In general, facilitators' predictions of time allocations and their perceptions of how they actually spent their time were very close.* In four of the 10 areas, the mean ratings were the same for actual and predicted time allocation. The greatest difference was reported for "providing for services of other MSDE staff with relevant expertise" (2.65 vs. 2.25). "Working with the LEA coordinator" and "informing local educators of relevant MSDE programs" also had relatively high differences. In all three cases, facilitators reported spending less time than they had predicted. Coordinators' perceptions of time allocations were less closely matched. The greatest difference ($t=.42$, $p>.05$) of mean scores was reported for "working with the LEA coordinator": coordinators perceived actual time spent by facilitators was much greater than they had anticipated. "Assisting in completion of products or tasks specified in the local implementation plan" ($t=.24$, $p>.05$) and "following local implementation plan" ($t=.19$, $p>.05$) were the next greatest differences, with coordinators perceiving less time actually spent by facilitators than they had predicted. The greatest difference of opinion between facilitators and coordinators on time actually spent was for working with the coordinator (facilitators' mean 3.05 vs. coordinators' mean 3.76). Both respondent groups expected and actually found very little time to be spent in providing for MSDE services.

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* "t" - tests were conducted to determine if significant differences existed between predicted and actual allocations of time for both coordinators and facilitators. The results of these analyses indicated that in all cases, these differences were not statistically significant.

Communication Responsibilities. Facilitators' predictions and actual use of time were less closely matched for communication tasks than for implementation tasks. In all but three tasks facilitators actually spent less time than they had predicted. The three tasks with the greatest differences were: "communicating with other facilitators" ($t=.60$, $p>.05$); "maintaining communication with the Director of State Implementation" ($t=.31$, $p>.05$); and "representing LEA interests and concerns to MSDE and Project Basic ($t=.27$, $p>.05$). Coordinators perceived facilitators spending less time than predicted in four areas. The three greatest differences were: "filing monthly reports" ($t=.36$, $p>.05$, more time spent than predicted); "conducting Project Basic orientation sessions" ($t=.24$, $p>.05$, less time spent than predicted); and "attending facilitator meetings scheduled by MSDE" ($t=.15$, $p>.05$, more time spent than predicted). Of particular note are the following findings: 1) both facilitators and coordinators expected and actually found a great deal of time to be spent on maintaining good relationships; 2) the greatest difference of opinion between facilitators and coordinators was found in relation to time expected to be spent on filing monthly reports; although coordinators revised their estimates a little by the end of the year, the range of opinion (within respondent groups) remained high; and 3) both groups found little time spent on networking (communication among facilitators).

Competencies. Facilitators and coordinators were asked to indicate the usefulness of additional planning or training for facilitators in each of the 37 competencies. Table 7 presents mean ratings for the groups by competency area. Table 9 shows the range, giving the mean percent of

Table 9

Perceptions of Usefulness of Additional Planning or Training:
Range of Responses by Competency Area

Competency Area	Facilitators N=22 Mean Percent				Coordinators N=20 Mean Percent			
	Ratings*				Ratings*			
	4	3	2	1	4	3	2	1
Communication skills	26.9	45	28	5.1	15.5	35.4	36.6	12.5
Problem solving skills	35.4	37.6	22	5	28.4	34.8	27	9.8
Leadership/management skills	21.4	39.1	34.6	5	12	45.2	31.9	10.9
Perception skills	11.3	53.8	30	5	11.3	40	29	19.8
Knowledge of Project Basic	23.2	32.5	37.5	6.9	20.9	35.3	30.2	13.6

Mean ratings can vary from a high of 4.00 (very useful) a low of 1.00 (not applicable)

group responses for each rating. According to the mean scores (Table 7), there was no strong indication for additional planning or training in any area. Variance of responses for coordinators was high in every area, and in general, coordinators considered additional planning or training (for facilitators) less desirable than did facilitators. When specific competencies were examined, the two in which most facilitators indicated a need for additional planning or training were "analyzing or diagnosing educational systems/situations" (mean rating 3.33) and "developing a support network among facilitators" (mean rating 3.14). The two competencies in which most coordinators indicated a need for additional planning or training (for facilitators) were "suggesting alternatives" (mean rating 3.00) and

"analyzing or diagnosing educational systems/situations" (mean rating 2.94). Closest agreement between groups was on "knowledge of Project Basic" -- an area in which additional planning or training was not considered useful.

Role Strengths. Data collected during interviews with facilitators, coordinators, and senior MSDE staff (eight respondents in each group) identified eight perceived role strengths (see Table 10). The most important set of statements volunteered indicated that without the facilitators Project Basic would not have been implemented, or would not have progressed on schedule. Another role strength was perceived to be evidence of good faith on the part of the MSDE in showing the LEAs that support had been provided, as previously promised. (This was a particularly important aspect, since Project Basic was legislatively mandated and the LEAs had no choice as to whether they would comply, but only in how they would meet the requirements.)

Problem Areas. Interview respondents suggested seventeen problem areas or barriers to the successful performance of the facilitator role. Table 11 presents a rank order summary of those areas. In general terms problems may be categorized as follows: 1) support (areas #2, 3, 7, 8, 13, 15, 16); 2) conflict of interest (areas #6, 10, 12, 14); 3) documentation and communication (areas #1, 5, 11, 17); and 4) imposition of external views (areas #4, 9).* Support problems may be further categorized as relating to resources (#3, 7, 8), expertise (#2, 13), and administration (#15, 16).

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* The last three categories were predicted during the preliminary design activities -- described in the Background Information section.

Table 10

Role Strengths, as Suggested by Interview Respondents
(by percent of respondents)

Strengths	Facilitators	Coordinators	MSDE Senior Management
	N=8	N=8	N=8
1. Facilitators ensured the effective implementation of Project Basic	0	53	25
2. Facilitators linked local-state relations	0	38	38
3. Facilitators have increased independence	38	13	0
4. Facilitators were competent specialists	0	50	0
5. Facilitators fulfilled SEA promise of support	0	25	25
6. Facilitators knew about MSDE resources	25	25	0
7. Project Basic resources supported facilitators	25	13	0
8. MSDE resources supported facilitators	0	0	13

Table 11

Problem Areas, as Suggested by Interview Respondents
(by percent of respondents)

Problem Areas	Facilitators	Coordinators	MSDE Senior Management
	N=8	N=8	N=8
1. Documentation was burdensome/time consuming	75	63	13
2. Problems in statewide testing created a "credibility gap"	38	38	13
3. Clerical support and copies of PB products were insufficient	75	13	0
4. PB appeared unreceptive to LEA needs	38	38	0
5. PB did not encourage networking among facilitators	38	13	13
6. Coordinators' other responsibilities prevented them from spending time needed with facilitators	25	38	0
7. Facilitators perceived some inequities of salary and benefits	13	25	13
8. PB did not always meet materials delivery deadlines	13	13	0
9. PB/MSDE did not understand difficulties of small LEAs where staff "wear many hats"	50	0	0
10. Facilitators, relocated to LEAs, suffered "displaced person" syndrome	25	25	0
11. Communication between facilitators and most MSDE staff did not exist	13	0	25
12. Facilitators with an elementary school orientation did not understand secondary school staff and students	0	13	25
13. Facilitator training was at too low a level	38	0	0
14. Facilitators had to cope with unanticipated tasks	13	13	0
15. PB did not provide enough feedback (frequency and specificity) to facilitators on their performance	13	13	0
16. Changes in personnel created program instability	0	25	0
17. Facilitators made false assumptions about the knowledge base on Project Basic of MSDE senior staff	0	0	13

Conflict of interest problems may be further categorized as relating to resources (#6, 14), and individual orientation (#10, 12). Both external imposition problems (#4, 9) relate to the extent of understanding of LEAs by the SEA.

Nature and Causes of Change. There was high consensus among interviewees that the facilitator role had developed a local orientation, with task variations occurring to meet the differing needs of the districts. A high degree of trust had been developed between facilitators and their LEAs; their reliability was appreciated and their responsiveness to local needs was acknowledged. As the facilitators became more accustomed to the role and gained greater confidence, they became "doers" instead of "learners." Some responses (13 percent facilitators, 38 percent MSDE management) suggested that the role had required a stronger "people" orientation and more management skills than had been anticipated. By contrast, 13 percent MSDE management believed that the role had required a greater curriculum and instruction orientation than had been anticipated. The strongest positive influence perceived by interviewees (63 percent facilitators, 38 percent coordinators, 25 percent MSDE management) related to the good relationships developed between the facilitators and LEAs. The strongest negative influence perceived (38 percent facilitators, 63 percent coordinators, 13 percent MSDE management) related to factors controlled by the Project Basic Office (e.g., resource support, testing program expertise).

Role Changes (School Years 1980 - 1982 and Beyond)

When asked to predict changes in the role for 1980-1981, respondents suggested two different trends: 1) a focus on managerial/administrative/coordinating activity, and 2) a focus on the use of content expertise or project-specific activity. The former -- coordinating function -- included: system-wide coordination of Project Basic activities; capacity-building of LEA staff; program development; and planning, management, and monitoring tasks. The latter -- instructional focus -- emphasized improvement of instructional efforts at the school level and included: school-based supervision; use of individual iniative/expertise/staff training, orientations, and presentations. A few respondents in both groups predicted a continuation of activities relating to the curriculum/competency match process.

The future extension of the role of facilitators or linking (liaison) agents to emcompass any and/or all future educational programs on a departmentwide basis was one of the secondary focal points of the study. Analysis of the data indicated the facilitators', coordinators' and MSDE senior management's positive reactions toward extension of the facilitators' role ranged from a low of 50 percent to a high of 75 percent. The respondents also indicated that persons who would fulfill the extended role, if it became a reality, would need to be generalists, rather than subject-area specialists.

The question of whether facilitators should be selected from MSDE staff or LEA staff brought [illegible] onse, with the majority of the

respondents favoring LEA-based staff. The responses advocating facilitators being selected from LEA staff ranged from a low of 13 percent to a high of 50 percent. Some respondents (25 percent of the coordinators and 25 percent of the MSDE senior management) felt there was no difference; both sources of selection were perceived to have advantages in that LEA-based facilitators provide immmediate access to school systems, while MSDE-based facilitators generally have to build up a confidence level and establish credibility with the LEAs before they are accepted and can work effectively, yet they have a wider network and knowledge base regarding MSDE programs and expertise available.

Discussion

The overall impression of the facilitator role during the first year of Project Basic implementation was very positive. Role incumbents -- whether drawn from MSDE or the LEAs -- provided information, technical assistance, and training to ensure the effective implementation of the state-mandated program, enacting the role in such a way as to represent the interests of the Project Basic as well as to respond to the specific needs of local school systems. The emphasis on assistance rather than accountability was maintained, and probably influenced the perceptions of trust and good relationships between facilitators and the LEAs. In using this strategy Project Basic operationalized Brickell's argument (1980, p. 58): "Mandates make the market for technical assistance. The classic one-two punch of a champion disseminator is a stinging mandate followed by a powerful technical assist."

However, although the role and functions of Project Basic facilitators were successful during the first year of implementation, barriers were identified and opportunities for improvement were recognized. Data have been reviewed by Project Basic staff and facilitators and implications identified. It is beyond the scope of this paper to examine those implications in depth, but a few may be discussed, both in terms of Maryland's Project Basic and in more general terms. The discussion is presented as four problem areas three of which were predicted during the preliminary role design phase and were still evident after a year of Project Basic implementation. Those categories relate to: support, conflict of interest, documentation and communication, and imposition of external views.

Support

Support and commitment were defined affectively (approval, willingness to participate), and in terms of resources (materials, time, clerical assistance); expertise (knowledge and skill in Project Basic content and processes); and administration (staffing, supervising). Data were collected about support for facilitators from ten interest groups covering state, local, and school levels, at the time the role was assumed (July 1979) and one year later. Respondents perceived that support increased from all groups, and even in July 1979 no group was perceived as unsupportive. Problems were reported in terms of resources, expertise, and administration, with the source of the problems perceived as MSDE Project Basic.

It is possible that the relatively high degree of support from interest groups may be attributed to the strategies employed in the development of

Project Basic (see Background Information), which encouraged participatory planning. The unanticipated problems in resources, expertise, and administration had a negative impact on facilitators but did not hinder their performance too seriously.

Conflict of Interest

From a total system or organizational perspective viewpoint, conflict was reduced by a variety of strategies (e.g., the SEA Project Basic team was made up of equal numbers of MSDE staff and "locals on loan;" facilitators came from both MSDE and the LEAs; the LEAs were represented on decision-making task forces). However, some problems remained as facilitators tried to achieve Project objectives and at the same time cope with pressure to work on LEA tasks. Problems were reported in terms of coordinators' available time for Project activities, "extra" assignments by LEAs to facilitators, and personal and professional orientations of facilitators coping with new work in new environments. These problems were not resolved, but each facilitator struggled with the role conflict -- specialist/project technicial vs. generalist/coordinator -- both in terms of state and local needs and in terms of professional career futures.

Documentation and Communication

There were two dilemmas relating to documentation and communication: central Project need to know vs. facilitator's desire for independence; traditional hierarchical structures vs. envolving lateral networks. These dilemmas are characteristic of dispersed organizations (Louis & Sieber, 1979), and are not easily resolved.

The central Project need to know was illustrated by record keeping requirements, and written and oral monthly reports. The facilitators (and LEA coordinators) felt too much time was spent on paperwork.

The second dilemma related to hierarchical vs. lateral communication. The Project structure required facilitators to communicate through the Director of Implementation to access information, or obtain assistance (Communications Network, 1979). However, MSDE facilitators wanted to use their own (specialist) contacts, and most facilitators also wanted the legitimate freedom to establish a lateral network among themselves. Also, small groups of facilitators rotated responsibility to report monthly to MSDE Division Directors who, (theoretically) passed on relevant information about Project Basic and LEA implementation — successes and needs — to Branch chiefs, who (theoretically) shared information with staff. Data indicated that information sharing was inadequate using this structure.

Imposition of External Views

In general terms, Project Basic took responsibility for statewide competency testing, set objectives and deadlines, required LEAs to "match" curriculum and competencies, suggested guidelines, and offered information and assistance. The means of carrying out the work was not imposed: LEAs designed their own implementation plans within the general state framework. However, in spite of participatory planning, many local systems perceived Project Basic as an external mandate.

The two problems reported in this area both suggested that the SEA (as represented by Project Basic) did not understand local needs, especially

small low-resource LEAs. However, that data should be balanced against responses indicating a relatively high degree of local support (Table 8).

Implications

It is possible that the problems relating to support, external imposition, conflict of interest, and documentation and communication cannot be resolved without creating other problems. However, they may be alleviated. The very nature of the organizational structure and state-local responsibilities determines a certain degree of "external imposition," which could only be removed by restructuring the system. In Project Basic, the strategy of using facilitators helped to reduce negative perceptions. Similarly, various strategies were helpful in reducing conflict between the SEA and LEAs. The personal dilemma in this area faced by facilitators (specialist/project technician vs. generalist/coordinator) appears to be common to all linkers, and is resolved individually (often by transfer to another job). If documentation and communication dilemmas are to be resolved, procedures and structures need to be designed to satisfy the needs of central management, local administration, and individual personalities -- an extremely difficult task. In all three areas, as various educational agencies develop linkages to coordinate resources and bring about school improvement, structures and strategies need to be tried in order to resolve unnecessary problems.

The findings of this study and others relating to Project Basic (Dudley, 1980; Turnbull, 1980; Shive, 1981) indicate that the strategy of assistance rather than accountability as carried out by the facilitators

has been effective for Maryland's competency based education program. Success is perceived by both SEA and LEAs.

Given that success, a question has been raised: In 1982, should the facilitator role be discontinued, or should it become permanent, with incumbents representing not only a single Project but any/all MSDE state school improvement priorities? The influences of reduction in funding allocations and federal regulations encouraging coordination suggest an affirmative answer. Even if a decision is made not to employ facilitators once Project Basic is implemented, the state-local linkage they have established will probably continue and the MSDE role will probably continue to reflect a philosophy of assistance.

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